

Medical Inventory Management

User Story:

The Medical Inventory Management System is a comprehensive Salesforce application designed to streamline and manage various operational aspects of the medical inventory. It can efficiently maintain supplier details, manage purchase orders, track product details and transactions, and monitor expiry dates of products, thereby improving operational efficiency, data accuracy, and reporting capabilities.

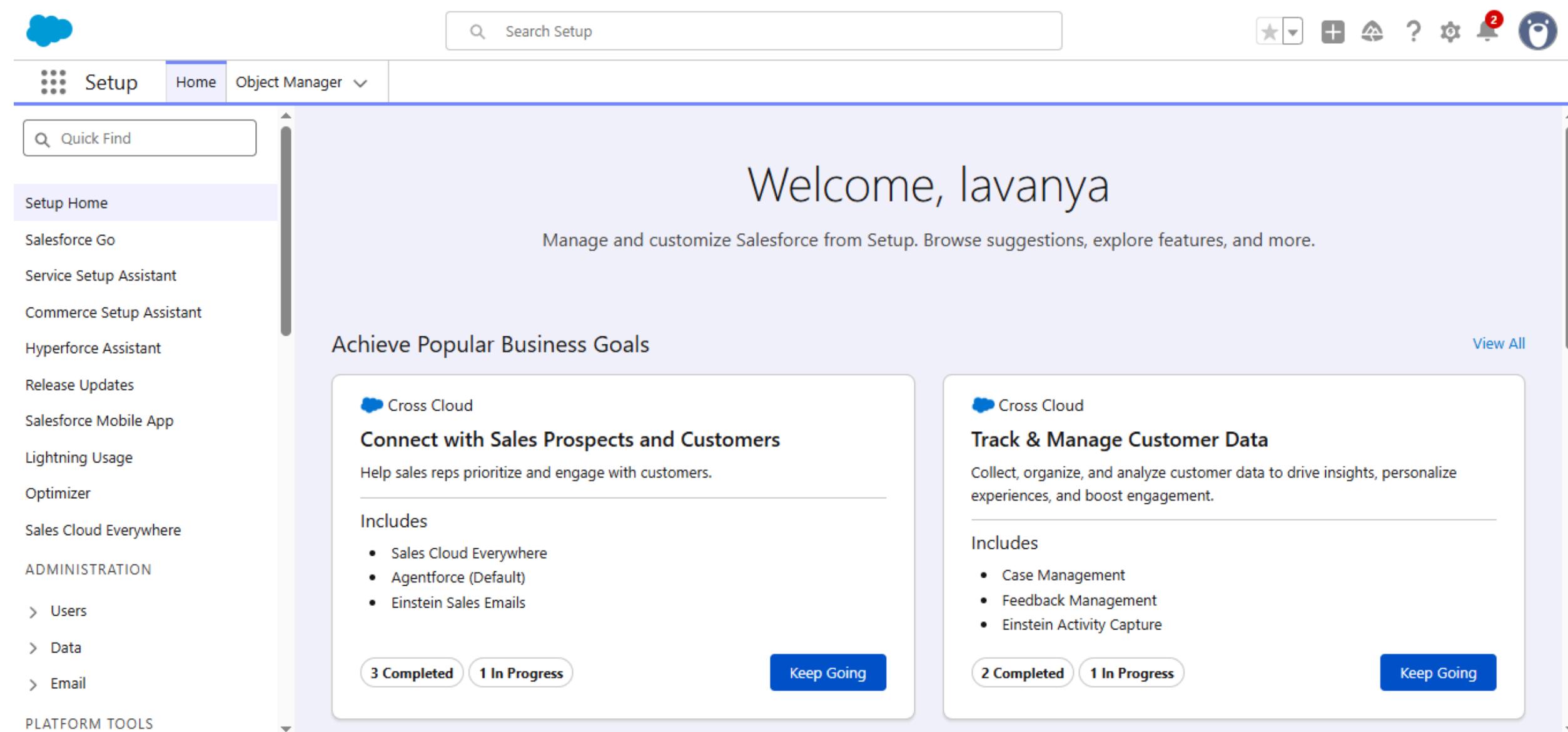
Project Overview :

This project is a comprehensive Salesforce application to streamline and manage various operational aspects of medical inventory. The system aims to efficiently maintain supplier details, manage purchase orders, track product details and transactions, and monitor the expiry dates of products. Maintain detailed records of suppliers, including contact information. Catalog product information, including descriptions, stock levels. Monitor and track product expiry dates to avoid using expired items. Comprehensive reports to track supplier performance, and purchase orders.

Project Flow:

- Milestone 1 : Creation of developer account
- Milestone 2 : Object Creation
- Milestone 3 : Tabs
- Milestone 4 : The Lightning App
- Milestone 5 : Fields
- Milestone 6 : Updating of Page Layouts
- Milestone 7 : Compact Layouts
- Milestone 8 : Validation rules
- Milestone 9 : Profiles
- Milestone 10 : Roles
- Milestone 11 : Users
- Milestone 12 : Permission Sets
- Milestone 13 : Flows
- Milestone 14 : Triggers
- Milestone 15 : Reports
- Milestone 16 : Dashboards

Step 1: Creating Developer Account

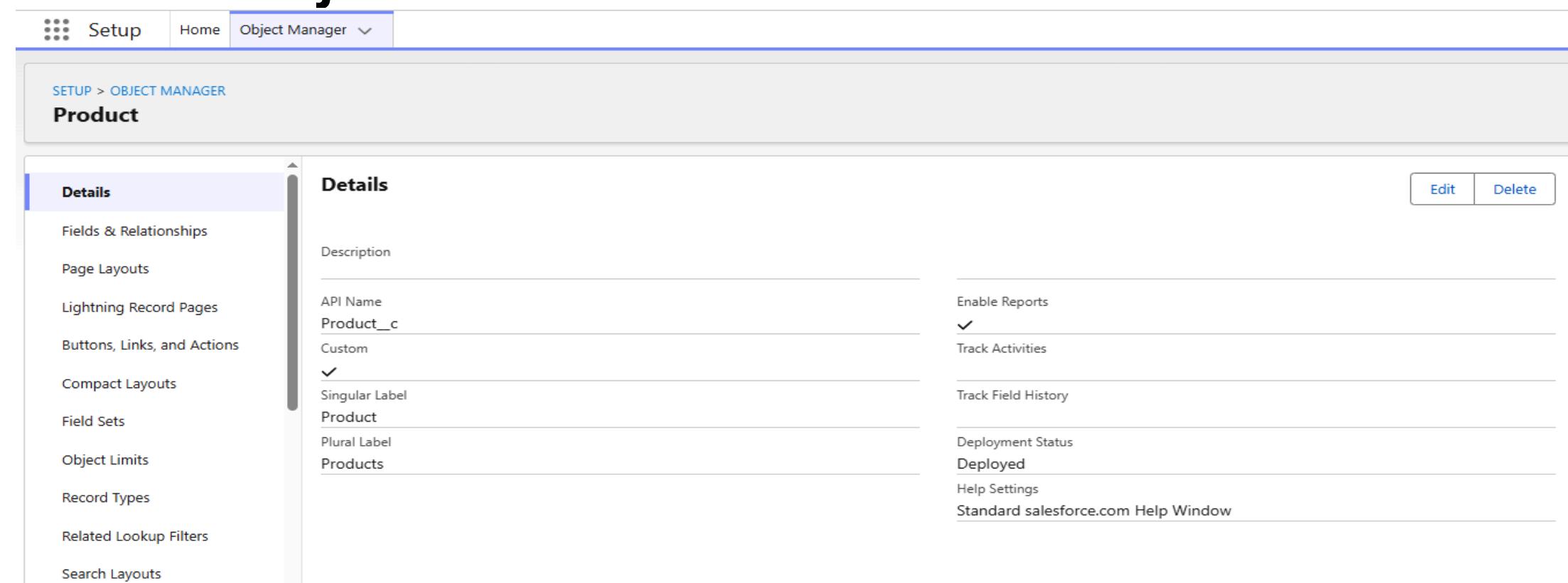


Step 2- Objects

In Salesforce, objects are database tables that allow you to store data specific to your organization.

Create Product, Purchase Order, Order Item, Inventory Transaction and Supplier objects.

1. Product object



2.Purchase order object

The screenshot shows the Salesforce Object Manager interface for the 'Purchase Order' object. The left sidebar contains navigation links for Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, and Search Layouts. The main 'Details' section displays the following configuration:

- Description: Purchase Order
- API Name: Purchase_Order__c
- Custom: ✓
- Singular Label: Purchase Order
- Plural Label: Purchase Orders
- Enable Reports: ✓
- Track Activities: ✓
- Track Field History: ✓
- Deployment Status: Deployed
- Help Settings: Standard salesforce.com Help Window

Buttons at the top right include 'Edit' and 'Delete'.

3.Order Item object

The screenshot shows the Salesforce Object Manager interface for the 'Order Item' object. The left sidebar contains the same navigation links as the previous screen. The main 'Details' section displays the following configuration:

- Description: Order Item
- API Name: Order_Item__c
- Custom: ✓
- Singular Label: Order Item
- Plural Label: Order Items
- Enable Reports: ✓
- Track Activities: ✓
- Track Field History: ✓
- Deployment Status: Deployed
- Help Settings: Standard salesforce.com Help Window

Buttons at the top right include 'Edit' and 'Delete'.

4.Inventory Transaction

The screenshot shows the Salesforce Object Manager interface for the 'Inventory Transaction' object. The left sidebar contains the same navigation links. The main 'Details' section displays the following configuration:

- Description: Inventory Transaction
- API Name: Inventory_Transaction__c
- Custom: ✓
- Singular Label: Inventory Transaction
- Plural Label: Inventory Transactions
- Enable Reports: ✓
- Track Activities: ✓
- Track Field History: ✓
- Deployment Status: Deployed
- Help Settings: Standard salesforce.com Help Window

Buttons at the top right include 'Edit' and 'Delete'.

5. Supplier

The screenshot shows the 'Object Manager' interface under 'SETUP > OBJECT MANAGER'. A sidebar on the left lists various configuration options for the 'Supplier' object. The main 'Details' tab is selected, displaying fields such as API Name (Supplier_c), Singular Label (Supplier), and Plural Label (Suppliers). On the right, there are buttons for 'Edit' and 'Delete', and sections for 'Enable Reports' (checked), 'Track Activities', 'Track Field History', 'Deployment Status' (Deployed), and 'Help Settings' (Standard salesforce.com Help Window).

Step 3- Tabs

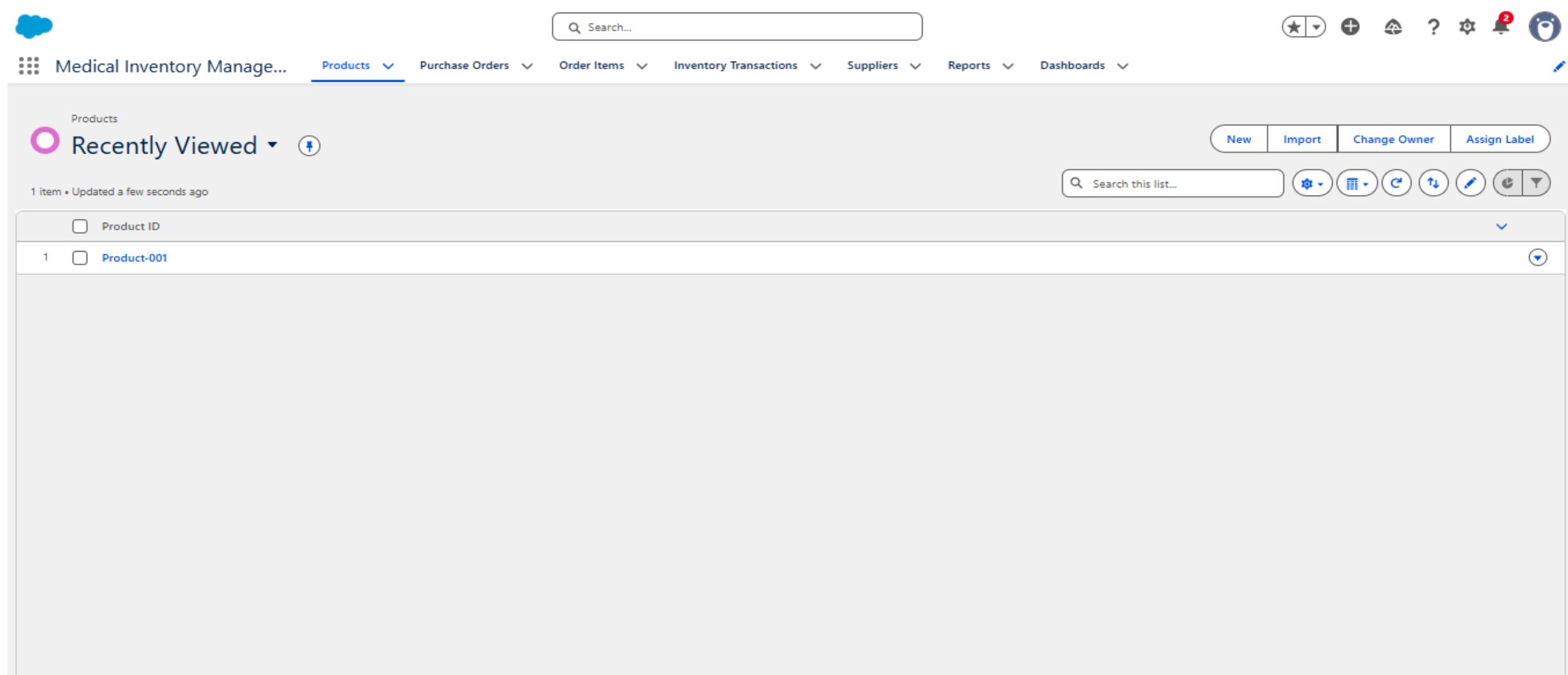
In Salesforce, tabs are used to make the data stored in objects accessible to users through the user interface. Tabs are a fundamental part of the Salesforce interface, providing a way to navigate to different objects and records.

The screenshot shows the 'Tabs' setup page under 'SETUP'. The 'Custom Tabs' section is displayed, showing five custom tabs for the 'Supplier' object. Each tab has a label (Inventory Transactions, Order Items, Products, Purchase Orders, Suppliers), an 'Edit | Del' button, a 'Tab Style' icon, and a 'Description' column which is currently empty. At the top of the page, there is a 'Custom Object Tabs' section with a table showing five tabs: Heart, Jewel, Circle, Dice, and Bridge, each with an 'Edit | Del' button and a 'Label' column. Below the tabs, there is a 'Web Tabs' section.

Action	Label
Edit Del	Inventory Transactions
Edit Del	Order Items
Edit Del	Products
Edit Del	Purchase Orders
Edit Del	Suppliers

Step 4- The Lightning App

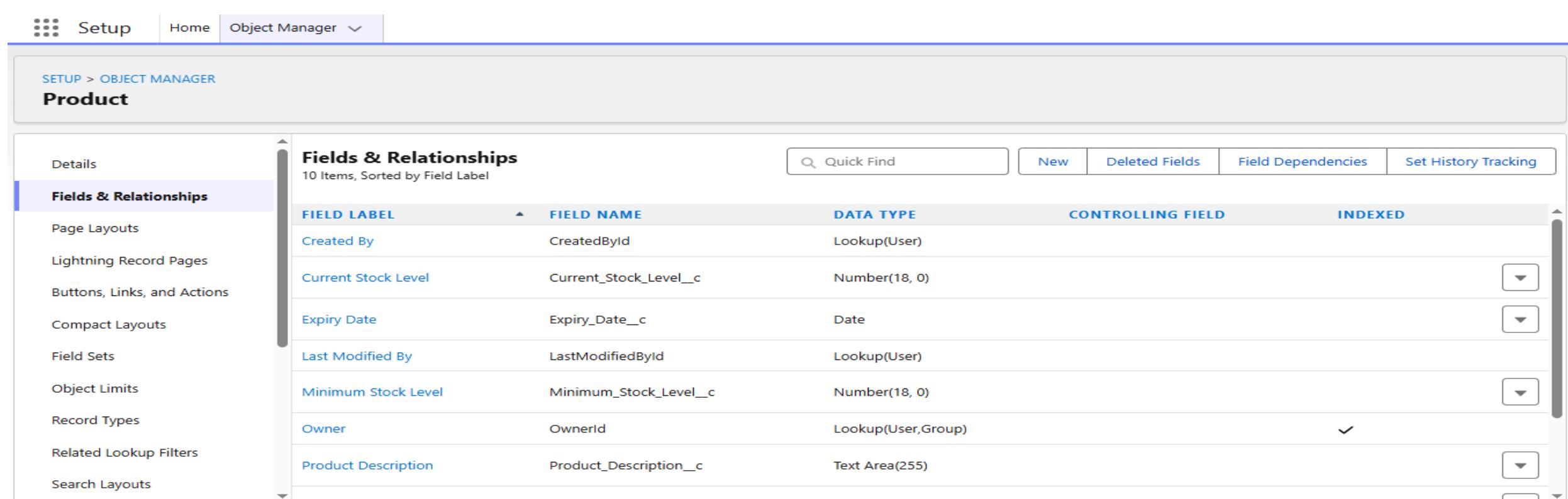
A Lightning App in Salesforce is a collection of items that work together to serve a particular function for the end-users. These items can include standard and custom objects, tabs, utilities, and other productivity tools. Lightning Apps are designed to provide a more intuitive and efficient user experience compared to traditional Salesforce apps.



Step 5- Fields

Create a field for each object there are product, purchase order, inventory transaction, order item and supplier object.

1.product fields



FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Current Stock Level	Current_Stock_Level_c	Number(18, 0)		
Expiry Date	Expiry_Date__c	Date		
Last Modified By	LastModifiedById	Lookup(User)		
Minimum Stock Level	Minimum_Stock_Level_c	Number(18, 0)		
Owner	OwnerId	Lookup(User,Group)		
Product Description	Product_Description__c	Text Area(255)		

2. Purchase order fields

The screenshot shows the Salesforce Object Manager for the 'Purchase Order' object. The left sidebar includes options like Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, and Search Layouts. The main area displays the 'Fields & Relationships' section with 10 items, sorted by Field Label. The table columns are FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. The fields listed are: Actual Delivery Date (Actual_Delivery_Date__c, Date), Created By (CreatedById, Lookup(User)), Expected Delivery Date (Expected_Delivery_Date__c, Date), Last Modified By (LastModifiedById, Lookup(User)), Order Count (Order_Count__c, Roll-Up Summary (COUNT Order Item)), Order Date (Order_Date__c, Date), and Owner (OwnerId, Lookup(User,Group)).

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Actual Delivery Date	Actual_Delivery_Date__c	Date		
Created By	CreatedById	Lookup(User)		
Expected Delivery Date	Expected_Delivery_Date__c	Date		
Last Modified By	LastModifiedById	Lookup(User)		
Order Count	Order_Count__c	Roll-Up Summary (COUNT Order Item)		
Order Date	Order_Date__c	Date		
Owner	OwnerId	Lookup(User,Group)		✓

3. Order Item fields

The screenshot shows the Salesforce Object Manager for the 'Order Item' object. The left sidebar includes options like Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, and Search Layouts. The main area displays the 'Fields & Relationships' section with 9 items, sorted by Field Label. The table columns are FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. The fields listed are: Amount (Amount__c, Formula (Currency)), Created By (CreatedById, Lookup(User)), Last Modified By (LastModifiedById, Lookup(User)), Order Item ID (Name, Text(80)), Product ID (Product_ID__c, Lookup(Product)), Purchase Order ID (Purchase_Order_ID__c, Master-Detail(Purchase Order)), and Quantity Ordered (Quantity_Ordered__c, Number(18, 0)).

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Amount	Amount__c	Formula (Currency)		
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Order Item ID	Name	Text(80)		✓
Product ID	Product_ID__c	Lookup(Product)		✓
Purchase Order ID	Purchase_Order_ID__c	Master-Detail(Purchase Order)		✓
Quantity Ordered	Quantity_Ordered__c	Number(18, 0)		

4. Inventory Transaction fields

The screenshot shows the Salesforce Object Manager for the 'Inventory Transaction' object. The left sidebar includes options like Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, and Search Layouts. The main area displays the 'Fields & Relationships' section with 8 items, sorted by Field Label. The table columns are FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. The fields listed are: Created By (CreatedById, Lookup(User)), Last Modified By (LastModifiedById, Lookup(User)), Owner (OwnerId, Lookup(User,Group)), Purchase Order ID (Purchase_Order_ID__c, Lookup(Purchase Order)), Total Order Cost (Total_Order_Cost__c, Formula (Currency)), Transaction Date (Transaction_Date__c, Date), and Transaction ID (Name, Text(80)).

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Purchase Order ID	Purchase_Order_ID__c	Lookup(Purchase Order)		✓
Total Order Cost	Total_Order_Cost__c	Formula (Currency)		
Transaction Date	Transaction_Date__c	Date		
Transaction ID	Name	Text(80)		✓

5. Supplier fields

The screenshot shows the Salesforce Object Manager interface for the 'Supplier' object. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. The main title is 'SETUP > OBJECT MANAGER Supplier'. On the left, a sidebar lists various configuration options under 'Fields & Relationships'. The main content area is titled 'Fields & Relationships' and displays a table with 9 items, sorted by Field Label. The columns are: FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. The data includes:

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Address	Address_c	Text Area(255)		
Contact Person	Contact_Person_c	Text(80)		
Created By	CreatedById	Lookup(User)		
Email	Email__c	Email		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Phone Number	Phone_Number_c	Phone		

Step 6 -Editing of Page Layouts

Page layouts in Salesforce are used to customize the organization, structure, and content of pages for viewing and editing records. They determine which fields, related lists, and custom links are visible to users, as well as the order and grouping of those elements.

1. A Page Layout in Product Object

The screenshot shows the Salesforce Object Manager interface for the 'Product' object. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. The main title is 'SETUP > OBJECT MANAGER Product'. On the left, a sidebar lists various configuration options under 'Page Layouts'. The main content area shows the 'Page Layouts' editor for the Product object. It includes a toolbar with 'Save', 'Quick Save', 'Preview As...', 'Cancel', 'Undo', 'Redo', and 'Layout Properties'. The layout itself consists of several sections: 'Fields' (with 'Section' and 'Blank Space' components), 'Information' (with fields like Product ID, Product Name, Expiry Date, etc.), 'System Information' (with Created By and Last Modified By), and 'Custom Links'.

2.A Page Layout in Purchase order Object

The screenshot shows the Salesforce Object Manager interface for the Purchase Order object. The left sidebar has 'Page Layouts' selected. The main area displays the page layout configuration with sections for Fields, Buttons, Quick Actions, Mobile & Lightning Actions, Expanded Lookups, Related Lists, and Report Charts. A 'Layout Properties' tab is visible at the top right. The page layout itself includes sections for Information, System Information, and Custom Links, each containing various fields like Purchase Order ID, Supplier ID, Order Date, and Total Order Cost.

3.A Page Layout in Order Item Object

The screenshot shows the Salesforce Object Manager interface for the Order Item object. The left sidebar has 'Page Layouts' selected. The main area displays the page layout configuration with sections for Fields, Buttons, Quick Actions, Mobile & Lightning Actions, Expanded Lookups, Related Lists, and Report Charts. A 'Layout Properties' tab is visible at the top right. The page layout includes sections for Order Item Detail, Product details, and System Information, each containing fields like Order Item ID, Amount, Product ID, Unit Price, and Purchase Order ID.

4.A Page Layout in Inventory Transaction Object

The screenshot shows the Salesforce Object Manager interface for the Inventory Transaction object. The left sidebar has 'Page Layouts' selected. The main area displays the page layout configuration with sections for Fields, Buttons, Quick Actions, Mobile & Lightning Actions, Expanded Lookups, Related Lists, and Report Charts. A 'Layout Properties' tab is visible at the top right. The page layout includes sections for Information, System Information, and Custom Links, each containing fields like Transaction ID, Purchase Order ID, Transaction Type, Owner, and Last Modified By.

5.A Page Layout in Supplier Object

The screenshot shows the Salesforce Object Manager interface for the 'Supplier' object. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. The left sidebar lists various configuration options: Details, Fields & Relationships, Page Layouts (which is selected and highlighted in blue), Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, and Search Layouts. The main workspace displays the 'Page Layouts' configuration for the Supplier object. It features a toolbar with 'Save', 'Quick Save', 'Preview As...', 'Cancel', 'Undo', 'Redo', and 'Layout Properties'. A 'Fields' section contains a 'Quick Find' field and a grid of fields: Section, Blank Space, Address, Contact Person, Created By, Email, Last Modified By, Phone Number, Supplier ID, Supplier Name, and Owner. Below this is a 'Information' section with fields for Supplier ID, Supplier Name, Contact Person, Phone Number, Email, Address, and Owner. A 'System Information' section includes fields for Created By and Last Modified By. A 'Custom Links' section is also present.

Step 7 - Compact Layouts

Compact layouts display a record's key fields at a glance, providing important information quickly without needing to open the record.

1: To create a Compact Layout to a Product Object

The screenshot shows the Salesforce Object Manager interface for the 'Product' object. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. The left sidebar lists various configuration options: Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts (which is selected and highlighted in blue), Field Sets, Object Limits, Record Types, Related Lookup Filters, and Search Layouts. The main workspace displays the 'Compact Layout Detail' for the 'Product Compact Layout'. The layout is titled 'Product Compact Layout' and has a 'Label' of 'Product Compact Layout' and an 'API Name' of 'Product_Compact_Layout'. It includes sections for 'Included Fields' (Product Name, Unit Price, Current Stock Level) and 'Created By' (lavanya R, 10/31/2025, 4:03 AM). There are also 'Edit', 'Clone', 'Delete', and 'Compact Layout Assignment' buttons. A 'Help for this Page' link is visible in the top right corner.

2: To create a Compact Layout to a Purchase Order Object

The screenshot shows the Salesforce Object Manager interface for the Purchase Order object. On the left, a sidebar lists various setup options like Details, Fields & Relationships, Page Layouts, and Compact Layouts. The Compact Layouts option is selected and highlighted in blue. The main content area displays the 'Purchase Order Compact Layout' detail page. It includes fields for Label (Purchase Order Compact Layout), API Name (Purchase_Order_Compact_Layout), and Included Fields (Purchase Order ID, Order Date, Total Order Cost, Supplier ID). It also shows the creation details (Created By: lavanya R., 10/31/2025, 4:13 AM) and modification details (Modified By: lavanya R., 10/31/2025, 4:13 AM). Action buttons for Edit, Clone, Delete, and Compact Layout Assignment are available at the top and bottom of the form.

Step 8 - Validation Rules

Validation rules in Salesforce are used to ensure data integrity by preventing users from saving invalid data in records. They consist of a formula or expression that evaluates the data in one or more fields and return a value of true or false. When the rule's criteria are met (i.e., the expression evaluates to true), an error message is displayed, and the user is prevented from saving the record until the issue is resolved.

1: To create an Expected Delivery Date Validation rule to a Employee Object

The screenshot shows the Salesforce Object Manager interface for the Purchase Order object. The sidebar again lists various setup options, with Compact Layouts selected. The main content area displays the 'Purchase Order Validation Rule' detail page. It includes fields for Rule Name (Expected_Delivery_Date_Validation), Error Condition Formula ((Expected_Delivery_Date__c - Order_Date__c) > 7), Error Message (The Expected Delivery Date should not exceed 7 days), and Active status (checked). It also shows the creation details (Created By: lavanya R., 10/31/2025, 5:18 AM) and modification details (Modified By: lavanya R., 10/31/2025, 5:18 AM). Action buttons for Edit and Clone are available at the bottom of the form.

Step 9 - Profiles

Profiles in Salesforce are fundamental to the platform's security model, defining what users can do within the organization. Profiles control a user's permissions to objects, fields, tabs, apps, and other settings. Each user in Salesforce must be assigned a profile, and the profile assigned to a user determines what they can see and do in the system.

1: To create an Inventory Manager Profile

The screenshot shows the Salesforce Setup interface. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. A search bar contains the text 'profil'. The main area is titled 'SETUP Profiles' with a blue icon. On the left, a sidebar shows 'Users' and 'Profiles' under 'Profiles' is selected. A message says 'Didn't find what you're looking for? Try using Global Search.' Below the sidebar, the profile details for 'Inventory Manager' are displayed. The profile name is 'Inventory Manager', user license is 'Salesforce', and it is a 'Custom Profile' (indicated by a checked checkbox). The 'Description' field is empty. The 'Created By' field shows 'lavanya R, 10/31/2025, 5:50 AM'. The 'Modified By' field shows 'lavanya R, 10/31/2025, 5:55 AM'. Under 'Page Layouts', the 'Standard Object Layouts' section shows 'Global' and 'Email Application' rows. The 'Global' row has 'Global Layout' and 'Location Group Assignment' with a link to 'Location Group Assignment Layout'. The 'Email Application' row has 'Not Assigned' and 'Macro' with a link to 'Macro Layout'. Other sections like 'Permissions' and 'Record Types' are partially visible at the bottom.

2: To create an Purchase Manager Profile

The screenshot shows the Salesforce Setup interface, similar to the previous one. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. A search bar contains the text 'profil'. The main area is titled 'SETUP Profiles' with a blue icon. On the left, a sidebar shows 'Users' and 'Profiles' under 'Profiles' is selected. A message says 'Didn't find what you're looking for? Try using Global Search.' Below the sidebar, the profile details for 'Purchase Manager' are displayed. The profile name is 'Purchase Manager', user license is 'Salesforce', and it is a 'Custom Profile' (indicated by a checked checkbox). The 'Description' field is empty. The 'Created By' field shows 'lavanya R, 10/27/2025, 8:07 AM'. The 'Modified By' field shows 'lavanya R, 10/31/2025, 5:59 AM'. Under 'Page Layouts', the 'Standard Object Layouts' section shows 'Global' and 'Email Application' rows. The 'Global' row has 'Global Layout' and 'Location Group Assignment' with a link to 'Location Group Assignment Layout'. The 'Email Application' row has 'Not Assigned' and 'Macro' with a link to 'Macro Layout'. Other sections like 'Permissions' and 'Record Types' are partially visible at the bottom.

Step 10 - Roles

Roles in Salesforce are used to control record-level access and define the hierarchy of an organization, determining the level of visibility and sharing of records among users. Roles work in conjunction with profiles to provide a robust security model. While profiles control what actions users can perform (object and field permissions), roles control which records users can see based on their position in the hierarchy.

1 : Create a Purchasing Manager Role.

The screenshot shows the 'Roles' page in the Salesforce Setup. The role being viewed is 'Purchasing Manager'. The 'Role Detail' section includes fields for Label (Purchasing Manager), This role reports to (SVP, Sales & Marketing), Modified By (lavanya R, 10/31/2025, 6:04 AM), Opportunity Access (Users in this role can edit all opportunities associated with accounts that they own, regardless of who owns the opportunities), Case Access (Users in this role can edit all cases associated with accounts that they own, regardless of who owns the cases), Role Name (Purchasing_Manager), Role Name as displayed on reports (SVP, Sales & Marketing), Sharing Groups (Role, Role and Internal Subordinates), and a note about Opportunity Access. Below this is a table titled 'Users in Purchasing Manager Role' showing one user assigned: John PurchaseM (Full Name, Alias jpurc, Username john@purchaseM12.com, Active status checked). A 'Help for this Page' link is also present.

2 : Create a Inventory Manager Role.

The screenshot shows the 'Roles' page in the Salesforce Setup. The role being viewed is 'Inventory Manager'. The 'Role Detail' section includes fields for Label (Inventory Manager), This role reports to (SVP, Sales & Marketing), Modified By (lavanya R, 10/31/2025, 6:04 AM), Opportunity Access (Users in this role can edit all opportunities associated with accounts that they own, regardless of who owns the opportunities), Case Access (Users in this role can edit all cases associated with accounts that they own, regardless of who owns the cases), Role Name (Inventory_Manager), Role Name as displayed on reports (SVP, Sales & Marketing), Sharing Groups (Role, Role and Internal Subordinates), and a note about Opportunity Access. Below this is a table titled 'Users in Inventory Manager Role' showing no records displayed. A 'Help for this Page' link is also present.

Step 12 - Permission Sets

Permission Sets in Salesforce are a powerful tool to extend user permissions beyond what is defined in their profiles. They allow administrators to grant additional access to various tools and functions without altering the user's profile. Permission sets are particularly useful for providing specialized permissions to specific users without the need to create multiple profiles.

1 : Create a Permission Set.

The screenshot shows the Salesforce Setup interface for creating a new Permission Set. The top navigation bar includes 'SETUP' and 'Permission Sets'. The main title is 'Purchase Manager Create Access'. Below the title, there are tabs for 'Find Settings...', 'Clone', 'Edit Properties', 'Manage Assignments', and 'View Summary'. The 'Edit Properties' tab is active. The 'Permission Set Overview' section displays the following details:

Description	API Name
Purchase Manager Create Access	Purchase_Manager_Create_Access
License	Namespace Prefix
Session Activation Required	Created By
<input type="checkbox"/>	lavanya R. 10/27/2025, 8:25 AM
Permission Set Groups Added To	Last Modified By
0	lavanya R. 10/31/2025, 6:12 AM

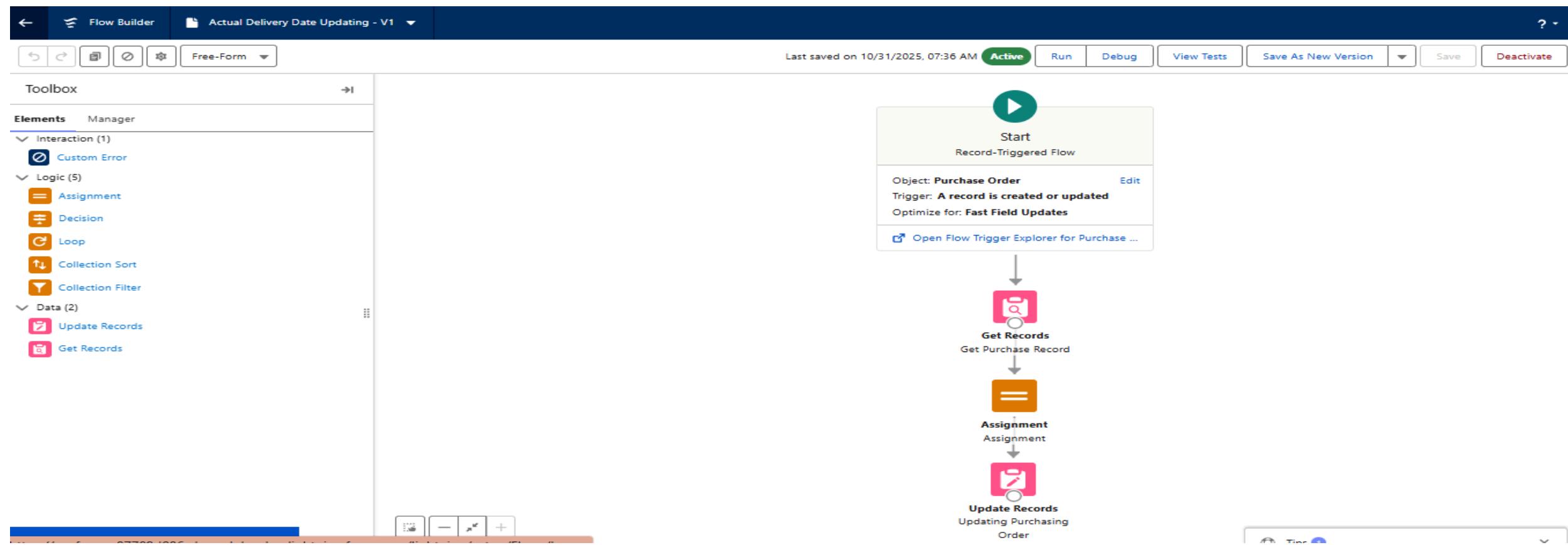
The 'Apps' section contains four categories:

- Assigned Apps**: Settings that specify which apps are visible in the app menu.
- Assigned Connected Apps**: Settings that specify which connected apps are visible in the app menu.
- Object Settings**: Permissions to access objects and fields, and settings such as tab availability.
- App Permissions**: Permissions to perform app-specific actions, such as "Manage Call Centers".

Step 13 - Flows

Flows in Salesforce, part of the Lightning Flow product, are powerful automation tools that help you collect data and perform actions in your Salesforce environment. Flows can be used to automate business processes, guide users through tasks, and integrate with external systems. They are highly versatile and can be configured to meet a wide range of business requirements without the need for custom code.

1 : Create Flow to update the Actual Delivery Date.



Step 14 - Triggers

Triggers in Salesforce are pieces of Apex code that execute before or after specific data manipulation events on Salesforce records, such as insertions, updates, deletions, and undeletions. They are powerful tools for automating complex business logic and ensuring data integrity by enforcing custom validation rules and workflows that cannot be achieved through declarative tools alone.

1 : Create a Trigger to Calculate total amount on Order Item.

```
trigger CalculateTotalAmountTrigger on Order_Item__c (after insert, after update, after delete, after undelete) {
    // Call the handler class to handle the logic
    CalculateTotalAmountHandler.calculateTotal(Trigger.new, Trigger.old, Trigger.isInsert, Trigger.isUpdate, Trigger.isDelete, Trigger.isUndelete);
}
```

Step 15 - Reports

Reports in Salesforce provide a powerful way to visualize and analyze data stored in your Salesforce organization. They allow users to create, customize, and share different types of reports based on data from standard and custom objects. Reports help organizations make informed decisions by providing insights into key metrics, trends, and performance indicators.

1: Create a Purchase Orders based on Suppliers(Summary) Report

Total Records: 5 Total Order Count: 5 Total Total Order Cost: \$144,950.00

Supplier ID	Purchase Order	Order Count	Total Order Cost
Supplier 001 (4)	Purchase-0001 (3)	1	\$1,050.00
		1	\$35.00
		1	\$2,500.00
	Purchase-0002 (1)	1	\$2,450.00
Supplier-002 (1)	Purchase-0002 (1)	1	\$138,915.00
Total (5)		5	\$144,950.00

2: Create a Complete Purchase Details Report

Total Records: 5 Total Order Count: 5 Total Quantity Received: 1,232 Total Amount: \$144,950.00

Supplier ID	Actual Delivery Date	Purchase Order	Product ID	Product Name	Order Count	Quantity Received	Amount
Supplier 001 (4)	11/3/2025 (3)	Purchase-0001 (3)	01dL00000VvXS1	Amoxicillin	1	500	\$2,500.00
			01dL00000VvXdJ	Paracetamol	1	5	\$35.00
			01dL00000VvXdJ	Paracetamol	1	150	\$1,050.00
		Subtotal			3	655	\$3,585.00
		Subtotal			3	655	\$3,585.00
	11/4/2025 (1)	Purchase-0002 (1)	01dL00000VvXgX	Cough Syrup	1	10	\$2,450.00
		Subtotal			1	10	\$2,450.00
		Subtotal			1	10	\$2,450.00
		Subtotal			4	665	\$8,035.00
Supplier-002 (1)	11/6/2025 (1)	Purchase-0002 (1)	01dL00000VvXgX	Cough Syrup	1	567	\$138,915.00
		Subtotal			1	567	\$138,915.00
		Subtotal			1	567	\$138,915.00
		Subtotal			1	567	\$138,915.00
Total (5)					5	1,232	\$144,950.00

Step 16 - Dashboards

Dashboards in Salesforce are dynamic visual representations of key metrics and data from reports, providing a consolidated view of organizational performance and trends. They are powerful tools for monitoring real-time data, tracking progress towards goals, and gaining actionable insights at a glance. Dashboards consist of components such as charts, tables, metrics, and gauges that display data from underlying reports.

1: - Create Dashboard

